

Chapter Overview

Introduction This chapter is designed to provide general and detailed information that will assist the SDA II user in preparing allotments for processing through PMIS/JUMPS.

In this chapter The following items will be discussed in this chapter:

Section	Item	See Page
A	General Allotment Information	20-A-1
B	Individual Allotments	20-B-1
C	Blanket Allotments	20-C-1
D	Electronic Fund Transfer (EFT) Allotments	20-D-1
E	Education Allotments	20-E-1
F	Indebtedness Allotments	20-F-1
G	Stop All Allotments	20-G-1

Section Overview

Introduction The objective of this section is to provide general information related to starting, stopping or changing allotments and bonds on active duty members and those reservists on Extended Active Duty.

In this Section The following topics will be discussed in this section:

Topic	See Page
Rules	20-A-2
References	20-A-2
Types of Allotments	20-A-3
Fast Path ID and Data Entry	20-A-4

General Allotment Information

Rules

PERSRUs are authorized to start, stop or change allotments and bonds as outlined in Chapter 7 of the CG Pay Manual. The following general rules apply:

- Individual allotments to type “H1”, “I1”, “L1”, “O1”, “S1”, or “D1” are no longer allowed. All allotments must be sent by EFT or blanket payment (if there is a blanket code set up for that company).
- Allotment starts and changes must process in PMIS/JUMPS prior to mid-month compute; e.g., an allotment start effective 1 March 1998 must process in PMIS/JUMPS prior to mid-month March 1998 compute cycle cut-off. Cycle cut-offs are published via e-mail ALPERSRU twice a year and reflected on the SDA II sign-on screen. Mid-month cut-offs generally fall around the 3rd of each month.
- Allotment stops must process in PMIS/JUMPS prior to the end-month compute of the following month; e.g., an allotment stop effective 30 April 1998 must process in PMIS/JUMPS prior to the May 1998 end-month compute cycle cut-off. End-month cut-offs generally fall around the 20th of each month.
- Allotment Starts, Stops, or Changes must not be submitted to PMIS/JUMPS more than two months in advance of desired action.
- Member must have enough projected pay to cover allotment amount. Consideration must be given when limited projected pay exists and member desires to stop an existing allotment in order to start another one.
- Member must not be liquidating advance pay and allowances.

References

Pay Manual, COMDTINST M7220.29 (series)
Personnel and Pay Procedures Manual, HRSICINST M1000.2A

Continued on next page

Section A
GENERAL ALLOTMENT INFORMATION

General Allotment Information, Continued

Types of Allotments All allotments fall into two general categories, Discretionary and Nondiscretionary. There are many different types of allotments within each category as outlined in the following tables:

Discretionary Allotments

Purpose Code(s)	Description
D1,D2, D3	Payment for support of dependent(s)
H1,H2, H3	Payment of home loan, mortgage, or rent.
I1,I2, I3	Payment of premium for commercial insurance such as life, health, dental, vehicle, etc.
L1,L2, L3	Payment to a financial institution for an automobile loan, home improvement loan, etc.
M2, M3	Navy Mutual Aid insurance.
O1,O2, O3	Payment to any individual, vendor, or financial institution for any legal purpose not covered by any other code.
S2	Deposits to a financial institution, mutual fund company, or investment firm for the personal or joint account of the member.
X2	Payment of dues to a Coast Guard Association.

Non-discretionary Allotments

Purpose Code(s)	Description
B1	Purchase of U.S. Savings Bonds – Series EE
G1	Purchase of U.S. Savings Bonds – Series I
C2	Charitable contributions to the Combined Federal Campaign (CFC).
E1	Payment to the Veteran’s Educational Assistance Program (VEAP).
F1	Payment to the Montgomery GI Bill (MGIB) Program.
L1,L2, L3	Payment of loans to CG Mutual Assistance or Morale Funds, Armed Forces Relief Societies, and the American Red Cross.
T1	Payment of indebtedness to the United States Government or a court appointed trustee under Chapter XIII of the bankruptcy act. T allotments are done at HRSIC only.

Notes:

- Purpose codes D3, H3, I3, L3, M3 and O3 are Electronic Fund Transfer (EFT) allotments and are reflected in PMIS/JUMPS as D2, H2, I2, L2, M2 and O2.
- Individual allotments to type “H1”, “I1”, “L1”, “O1”, “S1”, or “D1” are no longer allowed. All allotments must be sent by EFT or blanket payment (if there is a blanket code set up for that company).

Continued on next page

Section A
GENERAL ALLOTMENT INFORMATION

General Allotment Information, Continued

Fast Path ID and Data Entry Enter “mipaalot” for Fast Path ID or press “AJAA” from the Main Menu Screen in SDA II. Then enter the member’s SSN or last name and press <GO> or F1. The following screen should display:

Start, Stop, Change Allotments or Bonds (Screen 1 of 1)						
060-00-0005			SA DALLAS, STEVE			
Alt Num	Alt Type	Alt Action	Monthly Ded Amt	Account Number/Bond Owner/ Allotment Num	Effective Date	Tran Stat
002	X2	CURRENT	0005.00	005720158		
001	C2	CURRENT	0002.00	005720158		

The following is a list of fields on Screen 1 of 1 with their description:

Field	Description
Alt Num	Allotment number assigned by PMIS/JUMPS as reflected in the applicable segment and on member’s LES. This field is not accessible and will be blank until the first download following successful processing in PMIS/JUMPS.
Alt Type	Allotment purpose code.
Alt Action	Indicates status of transaction. Either Start, Stop or Current. <ul style="list-style-type: none">Starts will change to Current during first download following successful processing in PMIS/JUMPS.Stops will disappear during first download following successful processing in PMIS/JUMPS.Current should reflect all allotments currently running as listed in PMIS/JUMPS.
Monthly Ded Amt	Amount deducted monthly.
Account Number/Bond Owner/ Allotment Num	Self-explanatory.
Effective Date	Effective date of Start or Stop actions.
Tran Stat	Transaction status. Will either be “I” for incomplete, “C” for complete, “A” for approved or “T” for transmitted.

Continued on next page

General Allotment Information, Continued

**Fast Path ID
and Data
Entry,
Continued**

The following table is provided, as a general overview, to assist users in starting, changing or stopping allotments or bonds. Detailed instructions, for each type of allotment, are contained in this chapter.

From the Start, Stop, Change Allotments or Bonds (Screen 1 of 1):

To	Then Do This
Start Allotments or Bonds (except Education and Indebtedness)	Press <F3> to insert. You will then be prompted to enter an allotment type (or purpose code). If you know the allotment type, you may enter it, otherwise press <F2> for a list of valid types. To select a type from the help wheel, use the up or down cursor keys, by highlighting the desired type and pressing <GO> or <F1>. You must then press <TAB> or <RETURN> to proceed to the Alt Action field. Enter "Start" and press <GO> or <F1>. Refer to the applicable section of this chapter for detailed instructions by type of allotment.
Stop Allotments or Bonds (except Education and Indebtedness)	You may only stop an allotment that has an Alt Action of "Current". Highlight the current allotment you wish to stop and press <GO> or <F1>. Refer to the applicable section of this chapter for detailed instructions by type of allotment.
Change Allotments (Except Education and Indebtedness)	You may only change an allotment that has an Alt Action of "Current". Highlight the current allotment you wish to change and press <GO> or <F1>. Refer to the applicable section of this chapter for detailed instructions by type of allotment.
Start, Stop or Change Veterans Education Assistance Program (VEAP) Allotments	Completed by HRSIC (MAS) upon request from PERSRU.
Start, Stop or Change Indebtedness Allotments	Completed by HRSIC (DC) upon request from PERSRU.
Start or Stop Montgomery GI Bill Allotments	Completed by TRACEN Cape May, RESTRACEN Yorktown or NOAA from the Montgomery GI Bill Allotments transaction in the Member Initiated Pay Actions Menu.
Stop all Allotments	Press <F3> to insert. Enter "SA" in the Alt Type field. Press <TAB> or <RETURN> and enter "StopAll" in the Alt Action field. Then press <GO> or <F1>. You will then be prompted to enter an effective date and last deduction date. See the Stop All section in this chapter for detailed instructions.

Section Overview

Introduction The objective of this section is to provide detailed instructions for starting, bond allotments and for stopping bonds or individual allotments. This section applies to active duty members and those reservists on Extended Active Duty.

Individual Allotments are disbursed as a single check payment to an individual, financial institution, vendor, insurance company, etc., as long as the allotment is for a legal purpose. EFT payments for allotments are mandatory.

In this section Detailed instructions for the following items are discussed on the page indicated.

Item	See Page
Bond Allotment Starts (Type B1 and G1)	20-B-2
Bond Allotment Stops (Type B1 and G1)	20-B-5
Dependent Allotment Stops (Type D1)	20-B-6
Home Loan Allotment Stops (Type H1)	20-B-7
Commercial Life Insurance Allotment Stops (Type I1)	20-B-8
Loan Repayment Allotment Stops (Type L1)	20-B-9
Individual Allotment Stops (Type O1)	20-B-10

Bond Allotment Starts

Before you begin

There are two types of bonds. Series “EE” bonds are purchased at a cost of half of the face value of the bond. Procedures for starting them are on this page. Series “I” bonds are purchased at full face value of the bonds. Procedures for starting them are on page 20-B-3

How to Prepare Bond Allotment Starts for Series EE Bonds

Bond Allotment starts for series EE: (opens segment 78 in PMIS/JUMPS)

After entering Purpose Code “B1” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), and pressing <GO> or <F1>, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start EE Bond Allotment (Screen 1 of 2)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
Frequency: _____		
First Deduction Date: _____		
SSN of Owner: _____		
Co-owner/Beneficiary: _____		
SSN of Co-owner/Beneficiary: _____		

Begin filling in the fields as follows:

Field	Action																		
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.																		
Monthly Deduction Amount	Enter one of the following valid amounts (or press <F2> for a listing, highlight the valid amount and press <GO> or <F1>): <table><tr><td>Amount</td><td>Description</td></tr><tr><td>100.00</td><td>\$200.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>12.50</td><td>\$100.00 Face Value with 4 Monthly Deductions.</td></tr><tr><td>125.00</td><td>\$500.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>25.00</td><td>\$100.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>250.00</td><td>\$500.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>50.00</td><td>\$100.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>500.00</td><td>\$1000.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>62.50</td><td>\$500.00 Face Value with 4 Monthly Deductions.</td></tr></table>	Amount	Description	100.00	\$200.00 Face Value with 1 Monthly Deduction.	12.50	\$100.00 Face Value with 4 Monthly Deductions.	125.00	\$500.00 Face Value with 2 Monthly Deductions.	25.00	\$100.00 Face Value with 2 Monthly Deductions.	250.00	\$500.00 Face Value with 1 Monthly Deduction.	50.00	\$100.00 Face Value with 1 Monthly Deduction.	500.00	\$1000.00 Face Value with 1 Monthly Deduction.	62.50	\$500.00 Face Value with 4 Monthly Deductions.
Amount	Description																		
100.00	\$200.00 Face Value with 1 Monthly Deduction.																		
12.50	\$100.00 Face Value with 4 Monthly Deductions.																		
125.00	\$500.00 Face Value with 2 Monthly Deductions.																		
25.00	\$100.00 Face Value with 2 Monthly Deductions.																		
250.00	\$500.00 Face Value with 1 Monthly Deduction.																		
50.00	\$100.00 Face Value with 1 Monthly Deduction.																		
500.00	\$1000.00 Face Value with 1 Monthly Deduction.																		
62.50	\$500.00 Face Value with 4 Monthly Deductions.																		
Frequency	Automatically filled-in based on amount entered.																		

Continued on next page

Section B
INDIVIDUAL ALLOTMENTS

Bond Allotment Starts, Continued

**How to
Prepare Bond
Allotment
Starts for
Series I
Bonds**

Bond Allotment starts for series I: (opens segment 78 in PMIS/JUMPS)

After entering Purpose Code “G1” in the Alt Type field, entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), and pressing <GO> or <F1>, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start I Bond Allotment (Screen 1 of 2)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
Frequency: _____		
First Deduction Date: _____		
SSN of Owner: _____		
Co-owner/Beneficiary: _____		
SSN of Co-owner/Beneficiary: _____		

Begin filling in the fields as follows:

Field	Action																																				
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.																																				
Monthly Deduction Amount	Enter one of the following valid amounts (or press <F2> for a listing, highlight the valid amount and press <GO> or <F1>): <table><tr><td>Amount</td><td>Description</td></tr><tr><td>12.50</td><td>\$50.00 Face Value with 4 Monthly Deductions.</td></tr><tr><td>25.00</td><td>\$50.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>50.00</td><td>\$50.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>37.50</td><td>\$75.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>75.00</td><td>\$75.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>25.00</td><td>\$100.00 Face Value with 4 Monthly Deductions</td></tr><tr><td>50.00</td><td>\$100.00 Face Value with 2 Monthly Deductions</td></tr><tr><td>100.00</td><td>\$100.00 Face Value with 1 Monthly Deduction</td></tr><tr><td>50.00</td><td>\$200.00 Face Value with 4 Monthly Deductions.</td></tr><tr><td>100.00</td><td>\$200.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>200.00</td><td>\$200.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>125.00</td><td>\$500.00 Face Value with 4 Monthly Deductions</td></tr><tr><td>250.00</td><td>\$500.00 Face Value with 2 Monthly Deductions</td></tr><tr><td>500.00</td><td>\$500.00 Face Value with 1 Monthly Deduction</td></tr><tr><td>250.00</td><td>\$1000.00 Face Value with 4 Monthly Deductions</td></tr><tr><td>500.00</td><td>\$1000.00 Face Value with 2 Monthly Deductions</td></tr><tr><td>1000.00</td><td>\$1000.00 Face Value with 1 Monthly Deduction</td></tr></table>	Amount	Description	12.50	\$50.00 Face Value with 4 Monthly Deductions.	25.00	\$50.00 Face Value with 2 Monthly Deductions.	50.00	\$50.00 Face Value with 1 Monthly Deduction.	37.50	\$75.00 Face Value with 2 Monthly Deductions.	75.00	\$75.00 Face Value with 1 Monthly Deduction.	25.00	\$100.00 Face Value with 4 Monthly Deductions	50.00	\$100.00 Face Value with 2 Monthly Deductions	100.00	\$100.00 Face Value with 1 Monthly Deduction	50.00	\$200.00 Face Value with 4 Monthly Deductions.	100.00	\$200.00 Face Value with 2 Monthly Deductions.	200.00	\$200.00 Face Value with 1 Monthly Deduction.	125.00	\$500.00 Face Value with 4 Monthly Deductions	250.00	\$500.00 Face Value with 2 Monthly Deductions	500.00	\$500.00 Face Value with 1 Monthly Deduction	250.00	\$1000.00 Face Value with 4 Monthly Deductions	500.00	\$1000.00 Face Value with 2 Monthly Deductions	1000.00	\$1000.00 Face Value with 1 Monthly Deduction
Amount	Description																																				
12.50	\$50.00 Face Value with 4 Monthly Deductions.																																				
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500.00	\$1000.00 Face Value with 2 Monthly Deductions																																				
1000.00	\$1000.00 Face Value with 1 Monthly Deduction																																				
Frequency	Enter the correct frequency: M – Monthly B – BI Monthly T – Tri Annual																																				

Continued on next page

Bond Allotment Starts

**How to
Prepare Bond
Allotment
Starts,
Continued**

Field	Action
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for April 1998 would be entered as 9804).
SSN of Owner	Pre-filled with SSN of member.
Co-owner/Beneficiary	You must enter either "C" for Co-owner or "B" for Beneficiary.
SSN of Co-owner/Beneficiary	Enter ssn or leave blank.

Once you have entered the information on this screen, press <GO> or <F1>. The following screen should appear:

Start Bond Allotment (Screen 2 of 2)		
060-00-0005	SA	DALLAS, STEVE
Bond Owner		
First Name: STEVE	Last Name: DALLAS	
Co-Owner/Beneficiary: _____		
Example: Dan L. Jones (if co-owner/beneficiary does not have a middle initial/name DO NOT put NMI or NMN, only enter the First and Last names).		
Bond Owner's Address		
Address: _____		
City: _____ State: ____ ZIP: _____		

Begin filling in the fields as follows:

Field	Action
First Name and Last Name	Pre-filled and non-editable.
Co-Owner/Beneficiary	Enter name of Co-Owner or Beneficiary.
Bond Owner's Address	Enter Street address, City, State and Zip. Or press <F2> while on the Street address field for a list of existing addresses to copy.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Bond Allotment Stops

How to Prepare Bond Allotment Stops

Bond Allotment stops:

Highlight the “Current” Bond allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Bond Allotment with an Alt Action of “Current”. If a Bond Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Bond Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0050.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Dependent Allotment Stops

How to Prepare Dependent Allotment Stops

Dependent Allotment stops:

Highlight the “Current” Dependent allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Dependent Allotment with an Alt Action of “Current”. If a Dependent Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Dependent Support Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0050.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Home Loan Allotment Stops

How to Prepare Home Loan Allotment Stops

Home Loan Allotment stops:

Highlight the “Current” Home Loan allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1)”, press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Home Loan Allotment with an Alt Action of “Current”. If a Home Loan Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Home Loan Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0450.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Commercial Life Insurance Allotment Stops

How to Prepare Commercial Life Insurance Allotment Stops

Commercial Life Insurance Allotment stops:

Highlight the “Current” Commercial Life Insurance allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Commercial Life Insurance Allotment with an Alt Action of “Current”. If a Commercial Life Insurance Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Commercial Life Insurance Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Loan Repayment Allotment Stops

How to Prepare Loan Repayment Allotment Stops

Loan Repayment Allotment stops:

Highlight the “Current” Loan Repayment allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Loan Repayment Allotment with an Alt Action of “Current”. If a Loan Repayment Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Loan Repayment Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0100.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Individual Allotment Stops

How to Prepare Individual Allotment Stops

Individual Allotment stops:

Highlight the “Current” Individual (O1) allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop an Individual (O1) Allotment with an Alt Action of “Current”. If an Individual Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Individual Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0100.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section Overview

Introduction The objective of this section is to provide detailed instructions for starting, stopping or changing blanket allotments, for users of SDA II, on active duty members and those reservists on Extended Active Duty.

Blanket Allotments are disbursed as a single monthly check payment from one or more members to an individual, financial institution, vendor, insurance company, Coast Guard Association, CFC, etc., as long as the allotment is for a legal purpose.

In this Section The following types of allotments will be discussed in this section:

Type	Description	Page Number
C2	Charitable contributions to the Combined Federal Campaign (CFC)	20-C-2
D2	Payment for support of dependent(s)	20-C-4
	Savings Deposit Program	20-C-8
H2	Payment of home loan, mortgage, or rent.	20-C-9
I2	Payment of premium for commercial insurance such as life, health, dental, vehicle, etc.	20-C-13
L2	Payment to a financial institution for an automobile loan, home improvement loan, loans to CG Mutual Assistance or Morale Funds, Armed Forces Relief Societies, the American Red Cross, etc.	20-C-17
M2	Navy Mutual Aid insurance.	20-C-21
O2	Payment to any individual, vendor, or financial institution for any legal purpose not covered by any other code.	20-C-25
X2	Payment of dues to a Coast Guard Association.	20-C-29

Charitable Contributions to the Combined Federal Campaign (CFC)

How to Prepare Blanket CFC Allotment Starts

Blanket Charitable Contribution (CFC) Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “C2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start Charitable Contribution Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount. Amount must at least be \$1.00.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Enter Year and Month of last deduction. Last deduction date must always be December of calendar year starting.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Not used for this type of start.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Charitable Contributions to the Combined Federal Campaign (CFC), Continued

How to Prepare Blanket CFC Allotment Stops

Blanket Charitable Contribution (CFC) Allotment stops:

Highlight the “Current” CFC allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “Stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a CFC Allotment with an Alt Action of “Current”. If a CFC Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Charitable Contribution Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Payment for Support of Dependent(s)

How to Prepare Blanket Dependent Allotment Starts

Blanket Dependent Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “D2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start Dependent Support Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Non-editable on starts of this type.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Enter account or policy number.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Continued on next page

Payment for Support of Dependent(s), Continued

**How to
Prepare
Blanket
Dependent
Allotment
Stops**

Blanket Dependent Allotment stops:

Highlight the “Current” Blanket Dependent allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Blanket Dependent Allotment with an Alt Action of “Current”. If a Blanket Dependent Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Dependent Support Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Payment for Support of Dependent(s), Continued

**How to
Prepare
Blanket
Dependent
Allotment
Changes**

Blanket Dependent Allotment changes:

Highlight the “Current” Blanket Dependent (D2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “change” in the Alt Action field. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket Dependent Allotment with an Alt Action of “Current”.

Change Dependent Support Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0100.00		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 374 BENEFICIAL NATIONAL BANK		
Account/Policy Number: 55559999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Payment for Support of Dependent(s), Continued

**How to
Prepare
Blanket
Dependent
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Savings Deposit Program

Reference Personnel and Pay Procedures Manual, HRSICINST M1000.2 (series), Section 7-C

How to Prepare Blanket Savings Deposit Starts After entering Purpose Code “D2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1) press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen will appear:

Start Dependent Support Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. This will be the date the member signed the allotment worksheet.
Monthly Deduction	Enter a valid amount. The minimum amount is \$5.00. The maximum amount is the amount of the member's monthly Net Pay.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for October 1999 will be entered as 9910 and need to be submitted prior to the 10 th of October.
Last Deduction Date	Non-editable on starts of this type.
Blanket Code	Enter 850.
Account/Policy Number	Enter member's social security number.

When finishing filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tan Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

How to Prepare Blanket Home Loan Allotment Starts

Blanket Home Loan Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “H2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start Home Loan Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Non-editable on starts of this type.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Enter account or policy number.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

How to Prepare Blanket Home Loan Allotment Stops

Blanket Home Loan Allotment stops:

Highlight the “Current” Blanket Home Loan allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Blanket Home Loan Allotment with an Alt Action of “Current”. If a Blanket Home Loan Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Home Loan Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket
Home Loan
Allotment
Changes**

Blanket Home Loan Allotment changes:

Highlight the “Current” Blanket Home Loan (H2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1). Press <GO> or <F1>, enter “change” in the Alt Action field, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket Home Loan Allotment with an Alt Action of “Current”.

Change Home Loan Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0100.00		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 374 BENEFICIAL NATIONAL BANK		
Account/Policy Number: 55559999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Blanket Allotments, Continued

**How to
Prepare
Blanket
Home Loan
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket
Commercial
Life
Insurance
Allotment
Starts**

Blanket Commercial Life Insurance Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code "I2" in the Alt Type field and entering "Start" in the Alt Action field from the "Start, Stop, Change Allotments or Bonds" (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to "Verify that member has enough projected pay to cover allotment amount". If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start Comm. Life Insurance Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount. Amount must at least be \$1.00.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Not used for this type of allotment.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Enter account or policy number.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket
Commercial
Life
Insurance
Allotment
Stops**

Blanket Commercial Life Insurance Allotment stops:

Highlight the “Current” Commercial Life Insurance allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Commercial Life Insurance Allotment with an Alt Action of “Current”. If a Commercial Life Insurance Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Commercial Life Insurance Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket
Commercial
Life
Insurance
Allotment
Changes**

Blanket Commercial Life Insurance Allotment changes:

Highlight the “Current” Blanket Commercial Life Insurance (I2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “change” in the Alt Action field. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket Commercial Life Insurance Allotment with an Alt Action of “Current”.

Change Comm. Life Insurance Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount:	0000.00	
Old Deduction Amount:	0100.00	
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 025 BANKERS LIFE AND CASUALTY		
Account/Policy Number: 55559999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Blanket Allotments, Continued

**How to
Prepare
Blanket
Commercial
Life
Insurance
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket Loan
Repayment
Allotment
Starts**

Blanket Loan Repayment Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “L2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <spacebar> to continue. The following screen should appear:

Start Loan Repayment Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Enter Year and Month as necessary.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Enter account or policy number.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket Loan
Repayment
Allotment
Stops**

Blanket Loan Repayment Allotment stops:

Highlight the “Current” Loan Repayment allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Loan Repayment Allotment with an Alt Action of “Current”. If a Loan Repayment Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Loan Repayment Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket Loan
Repayment
Allotment
Changes**

Blanket Loan Repayment Allotment changes:

Highlight the “Current” Blanket Loan Repayment (L2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1). Press <GO> or <F1> and enter “change” in the Alt Action field. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <spacebar> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket Loan Repayment Allotment with an Alt Action of “Current”.

Change Loan Repayment Allotment (to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0100.00		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 374 BENEFICIAL NATIONAL BANK		
Account/Policy Number: 55559999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Enter Year and Month as necessary.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Blanket Allotments, Continued

**How to
Prepare
Blanket Loan
Repayment
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket Navy
Mutual Aid
Insurance
Allotment
Starts**

Blanket Navy Mutual Aid Insurance Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “M2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start Navy Mutual Aid Insurance Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 007		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Not used for this type of allotment.
Blanket Code	Pre-filled and non-editable.
Account/Policy Number	Enter account or policy number.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket Navy
Mutual Aid
Insurance
Allotment
Stops**

Blanket Navy Mutual Aid Insurance Allotment stops:

Highlight the “Current” Navy Mutual Aid Insurance allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Navy Mutual Aid Insurance Allotment with an Alt Action of “Current”. If a Navy Mutual Aid Insurance Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Navy Mutual Aid Insurance Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket Navy
Mutual Aid
Insurance
Allotment
Changes**

Blanket Navy Mutual Aid Insurance Allotment changes:

Highlight the “Current” Blanket Navy Mutual Aid Insurance (M2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1). Press <GO> or <F1> and enter “change” in the Alt Action field, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket Navy Mutual Aid Insurance Allotment with an Alt Action of “Current”.

Change Navy Mutual Aid Insurance Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0050.00		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 007 NAVY MUTUAL AID ASSN		
Account/Policy Number: 555599999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Blanket Allotments, Continued

**How to
Prepare
Blanket Navy
Mutual Aid
Insurance
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket
Individual
Allotment
Starts**

Blanket Individual Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “O2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start Individual Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Enter Year and Month if necessary.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Enter account or policy number.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

How to Prepare Blanket Individual Allotment Stops

Blanket Individual Allotment stops:

Highlight the “Current” Blanket Individual allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Blanket Individual Allotment with an Alt Action of “Current”. If a Blanket Individual Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Individual Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0100.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket
Individual
Allotment
Changes**

Blanket Individual Allotment changes:

Highlight the “Current” Blanket Individual (O2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, and enter “change” in the Alt Action field. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket Individual Allotment with an Alt Action of “Current”.

Change Individual Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0050.00		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 284 FIRST COMMONWEALTH LIFE INS CO		
Account/Policy Number: 555599999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Blanket Allotments, Continued

**How to
Prepare
Blanket
Individual
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket
USCG
Association
Dues
Allotment
Starts**

Blanket USCG Association Dues Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering Purpose Code “X2” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start USCG Association Dues Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: _____		
Account/Policy Number: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount. Amount must at least be \$1.00.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Not used for this type of allotment.
Blanket Code	Enter a valid code or press <F2> for a listing. To search for a valid code (while in the help wheel) press <shift+F3> and enter part or all of the description, press <GO> or <F1>, highlight the desired code then press <GO> or <F1> to select that code.
Account/Policy Number	Not used for this type of allotment.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Blanket Allotments, Continued

**How to
Prepare
Blanket
USCG
Association
Dues
Allotment
Stops**

Blanket USCG Association Dues Allotment stops:

Highlight the “Current” Blanket USCG Association Dues allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Blanket USCG Association Dues Allotment with an Alt Action of “Current”. If a Blanket USCG Association Dues Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop USCG Association Dues Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0002.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section C
BLANKET ALLOTMENTS

Blanket Allotments, Continued

**How to
Prepare
Blanket
USCG
Association
Dues
Allotment
Changes**

Blanket USCG Association Dues Allotment changes:

Highlight the “Current” Blanket USCG Association Dues (X2) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds” (Screen 1 of 1). Press <GO> or <F1> and enter “change” in the Alt Action field. A message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Note: You may only change the AMOUNT of a blanket USCG Association Dues Allotment with an Alt Action of “Current”.

Change USCG Association Dues Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0005.00		
First Deduction Date: _____		
Last Deduction Date: _____		
Blanket Code: 400 CG MUTUAL ASSISTANCE CAMPAIGN		
Account/Policy Number: 555599999		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.
Blanket Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Blanket Allotments, Continued

**How to
Prepare
Blanket
USCG
Association
Dues
Allotment
Changes,
continued**

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Section Overview

Introduction The objective of this section is to provide detailed instructions for starting, stopping or changing Electronic Fund Transfer (EFT) allotments, for users of SDA II, on active duty members and those reservists on Extended Active Duty.

In this Section The following types of allotments will be discussed in this section:

Note: The number “3” in each of the following types of allotments is strictly for SDA II use. The actual number built, recognized and returned by PMIS/JUMPS in the weekly download is “2” (e.g., a D3 allotment will be returned as D2 with a “Current” Alt Type).

Type	Description	Page Number
D3	Payment for support of dependent(s).	20-D-3
H3	Payment of home loan, mortgage or rent.	20-D-3
I3	Payment of premium for commercial insurance such as life, health, dental, vehicle, etc.	20-D-3
L3	Payment to a financial institution for an automobile loan, home improvement loan, loans to CG Mutual Assistance or Morale Funds, Armed Forces Relief Societies, the American Red Cross, etc.	20-D-3
M3	Navy Mutual Aid insurance.	20-D-3
O3	Payment to any individual, vendor, or financial institution for any legal purpose not covered by any other code.	20-D-3

Electronic Fund Transfer (EFT) Allotments

Purpose EFT Allotments are disbursed as a single electronic payment from a member to an individual, financial institution, vendor, insurance company, etc., as long as the allotment is for a legal purpose and the recipient is capable of receiving electronic payments.

Detailed instructions for the following items are discussed on the page indicated:

Item	See Page
How to Prepare EFT Allotment Starts	20-D-3
How to Prepare EFT Allotment Stops	20-D-4
How to Prepare EFT Allotment Changes	20-D-5

Continued on next page

Electronic Fund Transfer (EFT) Allotments, continued

How to Prepare EFT Allotment Starts

EFT Allotment starts: (opens segment 77 in PMIS/JUMPS)

After entering a valid Purpose Code of D3, H3, I3, L3, M3 or O3, in the Alt Type field, and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), and pressing <GO> or <F1>, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <spacebar> to continue. The following screen should appear:

Start (applicable name will appear) Allotment (EFT) (Screen 1 of 1)	
060-00-0005	SA DALLAS, STEVE
Effective Date: _____	
Monthly Deduction Amount: <u>0000.00</u>	
First Deduction Date: _____	
Account/Policy Number: _____	
EFT Account Code: _____	
Name Paid To: _____	
Routing Number: _____	
Check Digit: _____	

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	Enter a valid amount. Amount must at least be \$1.00.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Account/Policy Number	Enter Year and Month if necessary.
EFT Account Code	Enter appropriate code of “C” for Checking or “S” for Savings.
Name Paid To	Enter individual or institution name.
Routing Number	Enter eight digit routing number.
Check Digit	Enter check digit.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Electronic Fund Transfer (EFT) Allotments, continued

How to Prepare EFT Allotment Stops

EFT Allotment stops:

Highlight the “Current” EFT allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1). Current EFT allotments will appear as D2, H2, I2, L2, M2 or O2 and identified by the title of the stop action, on Screen 1. Press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop an EFT Allotment with an Alt Action of “Current”. If an EFT Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSICs SDA II maintenance team.

Stop (applicable name will appear) Allotment (EFT) (Screen 1 of 1)
060-00-0005 SA DALLAS, STEVE
Effective Date: _____
Last Deduction Date: _____
Allotment Number: 002

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Electronic Fund Transfer (EFT) Allotments, continued

How to Prepare EFT Allotment Changes

EFT Allotment changes:

Highlight the “Current” EFT allotment you desire to change in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1). Current EFT allotments will appear as D2, H2, I2, L2, M2 or O2 and are identified by the title of the change action, on Screen 1. Press <GO> or <F1>, enter “change” in the Alt Action field, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <spacebar> to continue. The following screen should appear:

Note: You may only change the AMOUNT of an EFT Allotment with an Alt Action of “Current”.

Change	(applicable name will appear)	Allotment (EFT) (Screen 1 of 1)
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Old Deduction Amount: 0050.00		
Account/Policy Number: 555599999		
EFT Account Code: S		
Name Paid To: _____		
Routing Number: 12345678		
Check Digit: 9		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Old Deduction Amount	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Account/Policy Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
EFT Account Code	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

Continued on next page

Electronic Fund Transfer (EFT) Allotments, continued

**How to Prepare
EFT Allotment
Changes,
Continued**

Field	Action
Name Paid To	Enter individual or institution name.
Routing Number	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.
Check Digit	Pre-filled and non-editable. Should correspond to PMIS/JUMPS.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Section Overview

Introduction The objective of this section is to provide detailed instructions for starting, stopping or changing Education allotments, (except for Reserve Montgomery GI Bill allotments which are covered in an earlier chapter) for users of SDA II, on active duty members and those reservists on Extended Active Duty.

In this Section The following types of allotments will be discussed in this section:

Type	Description	Page Number
E1	Payment to the Veteran's Educational Assistance Program (VEAP).	20-E-3
F1	Payment to the Montgomery GI Bill Program (MGIB).	20-E-3

Education Allotments

Purpose Education Allotments are deducted at the request of the member and disbursed to the Department of Veterans Affairs on a monthly basis.

Detailed instructions for the following items are discussed on the page indicated:

Item	See Page
How to Prepare Education Allotment Starts, Stops and Changes	20-E-3
Fast Path ID and Data Entry for MGIB Allotments	20-E-3

Continued on next page

Education Allotments, Continued

**How to
Prepare
Education
Allotment
Starts, Stops
and Changes**

VEAP (E1) Allotment starts, stops and changes are only completed by HRSIC (MAS) upon an individuals request. Requests may be submitted by electronic mail to MAS-T5/HRSIC07.

MGIB (F1) Allotment starts and stops may only be completed by HRSIC (dc), CG TRACEN Cape May (recruit PERSRU), RTC Yorktown (PERSRU) and NOAA (PERSRU). (opens segment 63 in PMIS/JUMPS)

**Fast Path ID
and Data
Entry for
MGIB
Allotments**

A Fast Path ID does not exist for the MGIB Allotment transaction. The transaction is located in the “Member Initiated Pay Actions Menu” accessed by pressing “AJAB” from the Main Menu Screen in SDA II. The following screen should display upon selecting the MGIB transaction by pressing <GO> or <F1>:

Note: You may only start MGIB allotments. If a change or stop is needed due to incorrect data, contact HRSIC(dc).

Montgomery GI Bill Allotments (Screen 1 of 1)				
<u>SSN</u>	<u>Name</u>	<u>Effective Date</u>	<u>First Deduct</u>	<u>Trans Status</u>

Continued on next page

Section E
EDUCATION ALLOTMENTS

Education Allotments, Continued

**Fast Path ID
and Data
Entry for
MGIB
Allotments,
continued**

Press <F3> to insert a social security number. The following screen should appear:

Montgomery GI Bill Allotments (Screen 1 of 1)						
SSN	Name	Kicker Elig	Kicker Rating	Effective Date	First Deduct	Tran Stat
_____				_____	_____	

Begin filling in the fields as follows:

Field	Action
SSN	Enter the member's social security number or press <F2> for a listing of SSNs in the database. Press <TAB> or <Return>.
Kicker Eligibility	This field can only be input by Cape May. If "W", then an allotment for MGIB must be started.
Kicker Rating	This field can only be input by Cape May. If Kicker Eligibility is "W", then Kicker Rating must be entered with a valid rating. If "blank", then Kicker Rating must be "blank".
Effective Date	Enter effective date of MGIB election.
First Deduct	Enter Year and Month of first deduction (e.g., starts for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off).

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the MGIB Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>. Press <F9> to return to the previous menu or <SHIFT+F9> to return to the main menu.

Section Overview

Introduction The objective of this section is to provide detailed instructions for starting, stopping or changing Indebtedness allotments, for users of SDA II, on active duty members and those reservists on Extended Active Duty.

In this Section The following type of allotment will be discussed in this section:

Type	Description	Page Number
T1	Payment of indebtedness to the United States Government or a court appointed trustee under Chapter XIII of the bankruptcy act.	20-F-3

Indebtedness Allotments

Purpose Indebtedness Allotments are only prepared by HRSIC for such items as bankruptcies and IRS tax levies.

Detailed instructions for the following items are discussed on the page indicated:

Item	See Page
How to Prepare Indebtedness Allotment Starts	20-F-3
How to Prepare Indebtedness Allotment Stops	20-F-5
How to Prepare Indebtedness Allotment Changes	20-F-6

Continued on next page

Indebtedness Allotments, Continued

**How to
Prepare
Indebtedness
Allotment
Starts**

Indebtedness Allotment starts: (opens segment 76 in PMIS/JUMPS)

After entering Purpose Code “T1” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), and pressing <GO> or <F1>, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <spacebar> to continue. The following screen should appear:

Start Repayment of Indebtedness to Government Allotment (Screen 1 of 2)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
First Deduction Date: _____		
Last Deduction Date: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction.
Monthly Deduction Amount	Enter a valid amount.
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for January 1998 would be entered as 9801 and need to be submitted prior to the mid-month January 1998 compute cycle cut-off.
Last Deduction Date	Enter Year and Month of last deduction.

When finished filling-in all required fields, press <GO> or <F1>. The following screen should appear:

Continued on next page

Section F
INDEBTEDNESS ALLOTMENTS

Indebtedness Allotments, Continued

**How to
Prepare
Indebtedness
Allotment
Starts,
continued**

Start Repayment of Indebtedness to Government Allotment (Screen 2 of 2)		
060-00-0005	SA	DALLAS, STEVE
<small>If sent to person, leave blank. If sent to a financial institute enter member's account number. If for child support enter case number.</small>		
<small>Account/Policy Number: 060000005</small>		
<small>If sent to person, enter first name, middle initial and last name of person. If sent to a financial institute enter name of the institute.</small>		
<small>Name Paid To: _____</small>		
<small>If sent to a dependent leave blank. If sent to a former spouse or guardian, enter 'FOR (CHILD'S FIRST NAME)'. If sent to a financial institution enter the member's name for the 'Account Name' field.</small>		
<small>Account Name: STEVEN DALLAS</small>		
<small>Allotment Address</small>		
<small>Address: _____</small>		
<small>_____</small>		
<small>City: _____</small>	<small>State: ____</small>	<small>ZIP: _____</small>

Begin filling in the fields as follows:

Field	Action
Account/Policy Number	Pre-filled and non-editable.
Name Paid To	Enter individual or institution.
Account Name	Pre-filled and non-editable.
Allotment Address	Enter Street address, City, State and Zip. Or press <F2> while on the Street address field for a list of existing addresses to copy. Note: If "Account Name" field is filled-in, you will only be able to enter one line of street address.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Indebtedness Allotments, Continued

**How to
Prepare
Indebtedness
Allotment
Stops**

Indebtedness Allotment stops:

Highlight the “Current” Indebtedness (T1) allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop an Indebtedness Allotment with an Alt Action of “Current”. If an Indebtedness Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSICs SDA II maintenance team.

Stop Repayment of Indebtedness Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0050.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Indebtedness Allotments, Continued

**How to
Prepare
Indebtedness
Allotment
Changes**

Indebtedness Allotment changes:

Highlight the “Current” Indebtedness (T1) allotment you desire to change in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “change” in the Alt Action field, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <spacebar> to continue. The following screen should appear:

Note: You may only change the AMOUNT of an Indebtedness Allotment with an Alt Action of “Current”. If an Indebtedness Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSICs SDA II maintenance team.

Change Repayment of Indebtedness Allotment (Screen 1 of 2)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
New Deduction Amount: <u>0000.00</u>		
Old Deduction Amount: 0150.00		
First Deduction Date: _____		
Last Deduction Date: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
New Deduction Amount	Enter new amount to be deducted.
Old Deduction Amount	Amount is pre-filled and non-editable.
First Deduction Date	Enter Year and Month of first (new) deduction (e.g., changes for April 1998 would be entered as 9804 and need to be submitted prior to the mid-month April 1998 compute cycle cut-off.
Last Deduction Date	Not used and non-editable.

Once you have entered the information on this screen, press <GO> or <F1>.
The following screen should appear:

Continued on next page

Section F
INDEBTEDNESS ALLOTMENTS

Indebtedness Allotments, Continued

**How to
Prepare
Indebtedness
Allotment
Changes,
continued**

Change Repayment of Indebtedness Allotments (Screen 2 of 2)					
060-00-0005	SA	DALLAS, STEVE			
Account/Policy Number: 060000005					
Name Paid To: US COAST GUARD					
Account Name: STEVEN DALLAS					
Allotment Address					
Address: 555 MAIN STREET					
Country: US					
City: TOPEKA	State: KS	Zip: 55555			

If an address appears on this screen simply press <GO> or <F1>. If no address appears, a message will appear on the bottom of the screen with instructions. You should be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Section Overview

Introduction The objective of this section is to provide detailed instructions for stopping all “Current” allotments, for users of SDA II, on active duty members and those reservists on Extended Active Duty.

In this Section The following type of action will be discussed in this section:

Type	Description	Page Number
SA	Stops all active allotments that are listed in PMIS/JUMPS..	20-G-3

Stop All Allotments

Purpose Allows a user to stop all active allotments listed in PMIS/JUMPS.

Note: Do not submit this transaction in connection with separation.
PMIS/JUMPS automatically terminates allotments upon separation.

Detailed instructions for the following item will be discussed in this section:

Item	See Page
How to Prepare a Stop All Transaction	20-G-3

Continued on next page

Stop All Allotments

**How to
Prepare A
Stop All
Transaction**

Stop All Allotments:

After entering the Purpose Code “SA” in the Alt Type field, and entering “Stopall” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>. The following screen should appear:

Stop All Allotments (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Last Deduction Date: _____		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Last Deduction Date	Enter Year and Month of Last deduction (e.g., stops for January 1998 would be entered as 9801).

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.
